DOCUMENT RESUME

ED 133 544 CE 009 582

TITLE	Legal Secretary: Task List Competency Record.
INSTITUTION	Minnesota Instructional Materials Center, White Bear Lake.
SPONS AGENCY	Minnesota State Dept. of Education, St. Paul. Div. of Vocational and Technical Education.
REPORT NO	VT-103-442
PUB DATE	76
NOTE	120p.; For related documents see CE 009 579-590
EDRS PRICE	MF-$0.83 HC-$6.01 Plus Postage.
DESCRIPTORS	Business Education; Clerical Occupations; Human Relations; Individual Development; *Job Skills; Lawyers; *Occupational Information; Office Occupations Education; Post Secondary Education; Records (Forms); Secondary Education; *Secretaries; Student Evaluation; Student Records; *Task Analysis
IDENTIFIERS	*Legal Secretaries; Minnesota

ABSTRACT

One of a series of 12 in the secretarial/clerical area, this booklet for the vocational instructor contains a job description for the legal secretary, a task list of areas of competency, an occupational tasks competency record (suggested as replacement for the traditional report card), a list of industry representatives and educators involved in developing the project, and statements of competencies and a separate competency record for the area of human relations and personal development. Job duties listed for the legal secretary require a knowledge of legal office procedures and competence in the use of legal terminology and legal documents, as well as in the basic secretarial skills of typing, correspondence, and office practices. Areas of competency in human relations and personal development are included (communication, self-development, personal appearance, office attitude, social and business etiquette, and job-seeking skills). Statements of competencies may be graded at either the secondary or postsecondary level, and the competency records are intended to follow the student through vocational training at both levels. Tasks in the task list are cross referenced with those in the booklets for other secretarial/clerical jobs. (MF)

****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

CE 009 582

ED133544

Legal Secretary

TASK LIST
COMPETENCY RECORD

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

VT-103-442

STATEWIDE CURRICULUM ARTICULATION PROJECT
FOR VOCATIONAL EDUCATION
3554 WHITE BEAR AVENUE
WHITE BEAR LAKE, MINNESOTA 55110

2a 2b

TABLE OF CONTENTS

I.	JOB DESCRIPTION	Page	1
II.	TASK LIST	Page	2
III.	COMPETENCY RECORD	Page	31
IV.	REPRESENTATIVES	Page	48
V.	DEVELOPERS	Page	49
VI.	HUMAN RELATIONS and PERSONAL DEVELOPMENT	Page	51
VII.	COMPETENCY RECORD	Page	58
VIII.	DEVELOPERS	Page	62

CROSS REFERENCE SYSTEM

Task Lists in the secretarial/clerical area include: office services aid, typist, general office/typist, receptionist, secretary/non-shorthand, secretary/shorthand, educational office personnel, medical secretary, legal secretary, administrative assistant, correspondence specialist, correspondence supervisor, and data entry operator. All Task Lists contain an add-on list of human relations/personal development qualities desirable for graduates seeking secretarial/clerical positions.

The task lists for office services aid, typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand are referred to as "GENERAL" secretarial/clerical lists and all additional lists are referred to as "SPECIALIZED" lists.

The * and the numbering system is the key to cross-referencing for the specialized lists. The specialized lists are compared to the lists for typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand. When there is something on the specialized list that is not on the general lists a * appears. The position of the * indicates the level of change made in the AREA OF COMPETENCY, The Statement of Competency, or the Task. For example, if the * appears before the AREA OF COMPETENCY the entire AREA OF COMPETENCY is new. If the * appears before a Statement of Competency or Task then only that Statement or Task is new. If the * appears before a word then only that word is new or different. It may be necessary to refer to more than one general task list when comparing statements of competency.

The Task List for Data Entry Operator is not referenced to the general lists because the tasks are unique in that area and need specialized training. The Task Lists for Correspondence Specialist and Correspondence Supervisor are not referenced to the general lists because tasks in these areas are applied to a word processing/correspondence center and the procedure for completing the tasks is different from the tasks in the general lists. The Task List for Correspondence Supervisor is cross-referenced as an add-on to the Correspondence Specialist Task List.

INDUSTRY RECOMMENDATIONS

LEGAL SECRETARY

Industry representatives have made several suggestions to students who will seek employment upon completion of this occupational program. These suggestions are general in nature and describe the kind of individual whom they wish to hire. A competent worker is one who satisfactorially performs the tasks listed in this document and one who is mature and responsible. It is important that an employee have a positive attitude toward work and that he/she continues to learn on the job.

One way an employee continues to learn is through reading articles in professional journals and publications. It is very important for a person in this position to use legal terminology properly, and intelligently communicate with employers, clients, and associates.

Individuals entering the legal secretarial field should acquaint themselves with local and county offices, such as the courthouse, the post office, and if possible attend a legal trial or proceeding which would be open to public viewing.

Workers entering this field should also be aware that the organizational structure of legal offices is moving toward a word processing concept.

The employee who is an asset to the business assumes responsibility for communications (both written and oral) that leave the office. This includes using correct grammar and punctuation, spelling words correctly, and proofreading carefully so that neat and accurate corrections are made. Accuracy and confidentiality are extremely important in legal occupations.

JOB DESCRIPTION

Legal Secretary

Legal Secretaries should have a knowledge of legal office procedures and be competent in the use of legal terminology and legal documents and be able to maintain strict absolute confidentiality.

This person should also be familiar with the basic secretarial documents used in a legal office as well as how to prepare them. He/she must also know how to compose simple letters, know general office procedures and have some type of shorthand, (machines, symbol, or speed writing). This person should be familiar with the concepts of word processing and the use of word processing equipment.

He/she must be able to handle clients in person and over the phone. A legal secretary should also have a knowledge of appointment making, court procedures, and general business and accounting practices related specifically to a legal office.

Graduates of the legal secretarial program find employment in: legal offices, real estate offices, trust departments of banks, corporate legal departments (trust and mortgages), government legal offices, private attorneys' offices, abstract offices, and insurance offices.

TASK LIST

The following Task List gives you, the vocational instructor, recommendations about what your students should be able to do when they take a job as a LEGAL SECRETARY. It was developed by a working committee of secretarial/clerical instructors and industry representatives throughout the state of Minnesota.

The Task List on the following pages includes the Tasks and the AREAS OF COMPETENCY recommended for a graduate of the Legal Secretarial Occupational Program.

As you utilize this task list, you will need to continue working with your local advisory committee and with other instructors in your geographic area. Judgments must be made, by you, concerning the amount of time to spend in teaching various tasks, the conditions surrounding the performance of each task and the performance level for each task that will be acceptable.

Legal Secretary

TASK LIST

AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS

*IV.A. Types *(or utilizes a word processing system and proofreads to obtain needed legal) and general business correspondence from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books and information gathered from other documents in the files)

1. types *lawyer's business and personal letters in several styles including any of the following features:

   a. attention line
   b. *copy notations

      *(1) cc carbon copy
      *(2) pc photo copy
      *(3) bcc or bpc blind

   c. company name in closing
   d. enclosure notations

---

* The position of the * denotes the scope of the change made in the task, the statement of competency or the area of competency. This task list is referenced to the task lists for typist, general office/typist, receptionist, secretary/non-shorthand and secretary/shorthand. If the * immediately precedes a word then only the word has been changed as compared to the five named lists. If the * immediately precedes the AREA OF COMPETENCY, a number, or a letter, then the entire area of concern has been changed.

e. listed material
f. mailing notations
g. multiple page headings
h. postscripts
i. quoted material
j. reference initials
k. special closings

*(1) company name
*(2) title

l. special-size stationery

(1) executive size
(2) half size
(3) legal size

m. statistical data in tabular form
n. subject line
*o. exhibit and attachment notations
*p. certified and registered notations
*q. valuable mail notations
*r. special instructions
*s. addresses for window envelopes

2. types addresses on envelopes

a. addresses for window envelopes
b. mailing address (including ZIP Code)
c. name above printed return address
d. return address
e. special notations
*f. exhibit and attachment notations
*g. certified and registered notations

3. types interoffice memoranda

a. -omit-
b. -omit-

*IV.B. Types multiple copies of general business forms that are pertinent to the specific business *(or for client's use) from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, *machine transcription, information compiled and composed at the typewriter, *(optional) *(telephone dictation, legal reference books, and information gathered from other documents in the files)

1. types general business forms

a. bills of lading
b. credit memorandums
c. -omit-
d. -omit-
e. invoices
f. purchase orders
g. purchase requisitions
h. statements of account
i. voucher checks
j. vouchers

*IV.C. Types *(or utilizes a word processing system and proofreads to obtain needed legal) and miscellaneous material from: typed rough draft, handwritten rough draft, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books, and information gathered from other documents in the files)

1. types miscellaneous material

a. address, file folder, and file drawer labels
b. index cards
c. form letters, form paragraphs, and fill-in information
d. lists (e.g. mailing)
e. summaries of minutes of meetings or conferences
f. telegrams, cablegrams, mailgrams

L 5

g. postcards
h. meeting agendas
i. daily work schedule
j. manuscripts
k. personnel forms
l. expense reports
m. speed-reply letters and memos
n. itineraries
o. other materials pertinent to the business

I.D. -omit-

I.E. Types or prepares *(and proofreads masters) copy for reproduction

1. -omit-
2. types or *prepares masters for photo reproduction

*I.F. Types and proofreads documents with multiple copies

I.G. Proofreads and makes neat and accurate corrections of *all typed material *(including originals and copies--very important)

1. makes corrections on

a. copies typed with fabric ribbons
b. copies typed with carbon ribbons
c. carbon copies
d. offset masters

*2. makes corrections using any of the following correction materials

a. correction fluid
b. correction tape
c. erasures
d. correcting typewriter
e. any other correcting techniques that become available

*I.H. Types or utilizes a word processing system and proofreads to obtain specialized legal business records for clients from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books and information gathered from other documents in the files)

1. types business forms

    a. purchase requisitions
    b. purchase orders
    c. receipts

        (1) will receipts
        (2) final receipts of heirs
        (3) special mailing receipts

2. types form letters, form paragraphs, and fill-in information

3. types trust accounts, receipts, and disbursement records

4. types closing statements

*I.I. Types or utilizes a word processing system and proofreads to obtain specialized legal reports from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books and information gathered from other documents in the files)

1. types technical (special area) reports
2. types Attorney's Title Opinions
3. types trade related application (e.g. patent trademark)

*I.J. Types or utilizes a word processing system and proofreads to obtain specialized legal documents and papers from: blank form, typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books and information gathered from other documents in the files)

1. types civil and criminal court documents such as

a. summonses
b. complaints
c. answers
d. motions and notices of motions
e. petitions
f. counterclaims
g. cross complaints
h. stipulations
i. verifications
j. affidavits
k. orders
l. judgments
m. powers of attorney
n. notes of issue
o. motions to strike
p. interrogatories
q. answers to interrogatories
r. notices of taking deposition
s. certificates of acknowledgement
t. briefs
u. jury instructions

2. types non-court documents such as

a. warranty deeds
b. quit claim deeds
c. mortgages
d. promissory notes
e. leases
f. sublease agreements
g. agency contracts
h. partnership agreements
i. articles of incorporation
j. corporate by-laws
k. corporate minutes
l. waivers
m. notices of corporate meetings
n. powers of attorney

o. proxies
p. stock certificates
q. bonds
r. U.C.C. financing statements
s. trust deeds
t. timber deeds
u. easements
v. contracts of sale
w. bills of sale
x. notary public jurats
y. prenuptial/antenuptial agreements
z. sheriff's sale forms
aa. mortgage foreclosures
bb. security agreements
cc. purchase agreements
dd. legal notices
ee. articles of co-partnership
ff. articles limited partnership
gg. statements for clients
hh. wills and trusts
ii. codicils
jj. contracts for deed
kk. affidavits of purchaser of registered land
ll. receipts of purchaser of registered land
mm. certificates of real estate value
nn. requests for accident reports
oo. requests for medical authorizations

3. types special court and administrative documents such as

a. probate forms
b. guardianship forms
c. dissolution of marriage forms
d. trust qualification documents
e. adoption forms
f. bankruptcy forms

g. juvenile court forms
h. worker's compensation forms
i. social security forms

I.K. Types specialized tax forms for clients for corporations, partnerships, sole proprietorships and individuals from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription,(telephone dictation, legal reference books and information gathered from other documents in the file), composing at the typewriter (optional)

1. types federal and state tax returns
2. types schedules
3. types extensions of time for filing returns
4. types applications for tax identification number
5. types non-probate forms

AREA OF COMPETENCY: COMMUNICATIONS COMPOSITION

*I.A. Composes business letters

1. composes business letters

a. requesting information and/or services
b. expressing appreciation
c. supplying information
d. responding to complaints
e. declining a request
f. acknowledging correspondence
g. expressing acceptance
h. requesting payment
i. giving confirmation
j. expressing condolence
k. extending congratulations
*1. setting, changing or cancelling appointments

I.B. Composes business and informational reports under direct supervision

I.C. Composes and/or edits other materials under direct supervision

1. gives dictation (such as to a correspondence *typist)
2. edits letters dictated by others
3. edits manuscripts prepared by others
4. proofreads typewritten/handwritten copy (very important)
5. prepares articles, announcements, news releases, form letters, and cover letters
6. prepares audio and visual materials
*7. consults reference sources for related materials
*8. designs and revises forms for office use

AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT (VERY IMPORTANT)

II.A. Maintains the currently used filing system

1. codes documents for filing
2. adds new folders
3. locates and retrieves documents
4. refiles documents that have been removed

   a. single pieces in file folders
   b. entire file folder in drawer

5. searches for missing and misplaced materials
6. maintains records of materials taken out of files
7. follows-up on released materials
*8. organizes materials within file folder
*9. maintains records of files removed from file cabinet
*10. opens new files

I.B. Revises files to keep them current

1. follows employer's directions for retention and disposal of records
2. follows office procedures for transferring files to inactive files

I.C. Cross-references documents and prepares cross-reference materials

I.D. Maintains index files

I.E. Maintains "tickler" files for follow up responsibilities

I.F. Maintains personal "work in progress" file

I.G. Operates micro-reproducing equipment (Optional)

I.H. Selects materials for micro-reproduction (Optional)

I.I. Determines recordkeeping needs and suggests a filing system

I.J. Establishes and sets up a filing system

1. requisitions necessary equipment and supplies
2. prepares folders and guides
3. files documents

I.K. Maintains files for shorthand notebooks

*I.L. Maintains files for clients' wills

1. clients' original wills
2. copies of clients' wills

*I.M. Conforms all files and copies of legal documents with originals

AREA OF COMPETENCY: PUBLIC RELATIONS AND STAFF SERVICES/RECEPTIONIST DUTIES

II.A. Screens persons who enter the office

1. screens visitors in compliance with company/institutions security policy
2. makes visitors comfortable
3. gives appropriate *(non-legal and non-confidential) information to visitors or answers questions about where needed information can be obtained
4. escorts visitors to appropriate office area
5. makes introductions
6. delivers oral or written messages from visitors to proper persons
7. handles business cards
8. provides company services within the scope of his/her authority
9. arranges for outside services such as taxi or limousine

I.B. Manages appointment information

1. schedules appointments
2. records appointments and keeps appointment book current
3. reminds persons of appointments
4. records cancellations and "no shows"
5. -omit-
6. pulls clients' files for personnel with special notations and reminders attached
7. makes notations from court calendars in attorney's appointment book

AREA OF COMPETENCY: OFFICE FUNCTIONS

I.A. Keeps the reception area in order

I.B. Operates intercom system

I.C. Maintains a bulletin board of announcements, news, etc.

I.D. Maintains employee information directory

I.E. Writes/prints legibly

*I.F. Attends station or arranges for replacement

AREA OF COMPETENCY: OFFICE EQUIPMENT

II.A. Maintains office equipment

1. changes equipment ribbons
2. cleans office equipment
3. recommends service on equipment
4. handles service calls on equipment
5. handles routine maintenance of equipment
6. makes minor repairs on office equipment

II.B. Selects and keeps equipment current

1. prepares requisitions for equipment
2. maintains records of equipment inventory
3. determines requirements for equipment
*4. orders equipment from suppliers under the direction of employer

*AREA OF COMPETENCY: OFFICE SUPPLIES AND LEGAL FORMS

III.A. Maintains and keeps up to date personal and office inventory of supplies

1. determines requirements for personal and office supplies and *(legal forms)
2. prepares requisitions or requests *(for supplies and legal forms)
3. maintains and checks inventory records to determine if minimum quantities of supplies *(and legal forms) are on hand (very important)
4. orders and obtains supplies *(and legal forms) as needed from suppliers

5. checks incoming supplies with packing slip or invoice
6. unpacks and stores incoming supplies
7. maintains suppliers contact files
8. distributes and controls office supplies *(and legal forms)
9. -omit-
10. -omit-

AREA OF COMPETENCY: MEETING/TRAVEL ARRANGEMENTS (VERY IMPORTANT)

I.A. Makes travel arrangements

1. plans a schedule using:

   a. travel agency
   b. printed schedules from transportation companies
   c. -omit-

2. composes, types, and mails letters of reservation
3. purchases and/or prepares tickets
4. prepares materials for employer's briefcase
5. prepares itinerary
6. makes and confirms transportation reservations
7. makes and confirms hotel and motel reservations
8. -omit-
9. -omit-
10. -omit-
*11. makes necessary telephone calls to assure travel arrangements

I.B. Schedules meetings/conferences/*depositions

1. contacts speakers
2. mails or distributes notices and specifics regarding location of meetings *(includes time, date, location, and written directions)
3. schedules meeting times

4. sends confirmation notes as reminders of meetings
5. makes and notifies participants of changes or cancellations of meetings
6. reserves meeting room and arranges for refreshments
7. prepares and inspects meeting room for arrangements and equipment
8. processes registration for conference participants
9. assembles needed materials for use during the meetings
10. prepares agenda for meetings
11. attends meeting and reads minutes
12. attends meeting and takes minutes
13. distributes the typed minutes in person or by mail
*14. types a summary of minutes of meetings
*15. contacts the court reporter
*16. arranges luncheon meetings or conferences

AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS

I.A. Answers incoming telephone calls

1. uses single line
2. uses multiple line
3. transfers calls to correct department or person
4. screens incoming calls
5. answers *non-legal inquiries posed by telephone callers
6. records telephone messages (date and time)
7. requests complete information to make return calls
8. delivers telephone messages promptly

I.B. Places outgoing telephone calls

1. places local calls
2. places long distance calls

   a. direct distance dial (ddd)
   b. person-to-person
   c. station-to-station

d. collect
e. credit card
*f. other number charges

3. places calls using specialized telephone services

a. conference calls
b. overseas long-distance calls
c. telephone facsimile equipment
d. specialized long-distance networks, such as WATS
*e. telex

I.C. Places outgoing and receives incoming calls using specialized telephone equipment

1. operates speakerphone
2. operates picture phone (optional)
3. uses bell boy service (pager service)
4. uses card dialers
5. -omit-
6. -omit-

I.D. Finds needed information by using the telephone directory

1. uses white pages
2. uses yellow pages

II.E. Maintains internal telephone records and checks them against billing

1. keeps list of frequently called numbers current
2. records long distance calls made
3. reminds employer to return calls
4. checks bill from telephone company with record of long distance calls made

I.F. Answers incoming calls using a switchboard

*I.G. Places specialized calls

1. places specialized call to

a. police or sheriff's office for service of legal papers
b. clerks of the various courts for court information
c. attorneys' offices for special meetings, information, depositions, etc.
d. government offices for pertinent information

AREA OF COMPETENCY: MAIL

II.A. Receives and processes incoming mail

1. collects mail from post office or mailing department (optional)
2. sorts unopened incoming mail for delivery to departments or individuals

a. business
b. personal

3. mends torn or damaged mail
4. prepares and attaches a routing slip
5. delivers incoming mail to proper persons or department
6. makes notation in mail register
7. signs for packages received from shippers or UPS
8. pays for packages received COD
9. determines disposition of inadequately addressed mail
10. opens incoming business mail, sorts contents, checks enclosures, time/date stamps *(notes important information, compares letters and envelope addresses)
11. attaches pertinent information to incoming mail
12. makes filing and/or calendar notations
*13 accepts, accounts for, and records deliveries
*14. pulls client's file and attaches correspondence for attorney

I.B. Prepares outgoing mail

1. collects mail from other offices or departments (optional)
2. folds and stuffs envelopes for mailing

3. addresses envelopes for mass mailings
*4. decides on most desirable way to communicate
5. processes outgoing letters and packages requiring special handling or special rates
6. processes bulk mailings
7. prepares and sends telegrams, cablegrams, or mailgrams
8. prepares, updates, and checks mailing lists
9. operates a postage meter
10. records use of postage meter in "Meter Record Book"
11. takes postage meter to post office to be refilled (optional)
12. operates a postage scale to determine correct postage
13. attaches correct postage
14. wraps packages for mailing
15. writes zip codes on incoming or outgoing mail
16. files return receipts from registered or certified mail
17. insures mail
18. registers mail
*19. certifies mail

AREA OF COMPETENCY: REPROGRAPHIC SERVICES

II.A. Supervises and/or creates needed copies

1. operates duplicating equipment

a. -omit-
b. copier

*(1) photocopier
*(2) Xerox copy machine
*(3) A. B. Dick Copy machine
*(4) 3M Copy Machine
*(5) others

2. collates materials

a. manually
b. by machine

3. binds material

   a. manually
   b. by machine

4. folds pages

   a. manually
   b. by machine

5. proofreads to insure accuracy

I.B. Makes decisions about reprographic needs

1. decides what materials need to be copied
*2. decides on the most desirable method to create needed copies
3. makes arrangements to have materials duplicated

*I.C. Proofreads at all stages to insure accuracy (Very important)

*I.D. Inserts additional corrected or edited material for reproduction by cutting or taping

AREA OF COMPETENCY: NUMERICAL DATA

I.A. Maintains a petty cash fund

1. obtains checks to establish or replenish petty cash
2. makes payments from petty cash
3. prepares vouchers for money taken out or received
4. records petty cash entries in a journal or check register
5. prepares petty cash reports

I.B. Maintains a pegboard accounting system as needed for specific business (e.g. payroll, cash receipts)

I.C. Prepares payroll

1. distributes W-4 Forms to new employees
2. maintains personnel records
3. prepares time cards for employees
4. computes payroll

    a. time worked

        (1) timeclock
        (2) handwritten records

5. computes city, state, or federal taxes using printed tax tables
6. records time, earnings, etc., on employee's earnings record
7. prepares payroll checks
8. distributes payroll checks
9. compiles payroll information to prepare employer's quarterly and annual tax forms
10. prepares and mails payroll tax reports
11. prepares and mails/distributes end of year reports (W-2 Forms)
12. keeps records of vacation time
13. keeps personnel records of sick leave

I.D. Maintains *office checking and *trust accounts

1. prepares receipts for incoming cash
2. endorses incoming checks for deposit
3. prepares bank deposits from incoming cash
4. enters amount of deposit in checkbook
5. enters deposits in journals or check register
6. takes deposits to bank according to accepted procedure
7. prepares checks
8. uses checkprotector
9. enters checks written in journal or check register
10. reconciles bank statements
11. files cancelled checks
12. signs a check signature card to sign checks

13. signs checks (optional)
14. purchases special checks from the bank

    a. certified
    b. bank drafts
    c. money orders

I.E. Handles payment of bills and statements

1. checks accuracy of source documents
2. verifies items and checks accuracy and figures on statements
3. calculates discounts
4. prepares checks
5. records on the invoices or statements the date paid, check number, initials
6. attaches stubs of bills to checks and presents for signature
7. files invoices/statements marked paid

I.F. Maintains accounts receivable records

1. calculates accounts receivable from source documents to keep *clients ledger *sheet current (very important)
2. prepares billing for accounts receivable

    a. makes a copy of the bill
    b. mails the bill

3. prepares lists of delinquent accounts

*4. ages clients' ledger sheet (very important)

*5. maintains credits and collections

    a. prepares promissory notes or drafts
    b. calculates and maintains records of maturity dates
    c. prepares follow-up statements and letters to delinquent accounts

I.G. Maintains accounts payable records

1. calculates accounts payable from source documents to keep accounts payable records current
2. records payments

I.H. Maintains journals

1. prepares purchase orders, invoices, vouchers, receipts or other source documents to record in journals
2. records data in journals, for financial statements
3. prepares periodic trial balance of the books

I.I. -omit-

I.J. Operates an accounting machine *(to post to clients' ledger cards (Optional)

*I.K. Prepares financial reports

*I.L. Maintains investment and insurance records

1. processes securities (stocks & bonds), real estate, and insurance premiums
2. computes interest
3. calculates and records all income received
4. makes premium payments
5. keeps records for tax purposes
6. keeps files current

*I.M. Prepares income tax returns

*I.N. Maintains designated time records

1. maintains time records for

   a. billable hours
   b. administrative hours

AREA OF COMPETENCY: DATA PROCESSING

I.A. Codes forms for data entry

I.B. Reads computer printouts to obtain information to prepare required reports

I.C. Checks source documents against computer printouts for accuracy

I.D. Operates CRT Display screen to check for accuracy or verification of information (Optional)

*AREA OF COMPETENCY: SPECIAL RECORDS

I.A. Maintains and stores specific legal documents to keep them current (e.g. attorney's diary, court calendars, trust accounts)

1. makes entries in attorney's diary
2. maintains clients' trust accounts
3. maintains docket system
    a. court calendars
    b. deadlines
4. stores lawsuits by case name (pltf. vs. deft.)
5. maintains wills in firm's bank vault for clients

AREA OF COMPETENCY: REFERENCE MATERIALS

III.A. Uses general reference materials to look up spelling, pronunciation, definition of terms, compose, edit, aid in research, and *word division

1. uses general reference materials

a. office or company's procedures manual
b. dictionary
c. telephone directory and yellow pages
d. quick reference words manual
e. thesaurus
f. outside agencies (both internal and external to the profession)
g. city directory
h. postal manual
i. ZIP Code directory
j. secretary's reference manual
k. company files
l. past records
m. word division manual
n. equipment operator manual
o. library
*p. hotel and travel guides

I.B. Maintains a reference library

*I.C. Uses reference materials specifically for the legal secretary to compose, edit, aid in research, look up spelling, definitions of terms, etc.

1. uses specific legal reference materials

a. Law Library Reference Books
b. legal Latin words and phrase manuals
c. legislative books
d. Martindale-Hubbell Law Directories
e. The American Bar Association
f. Legal Secretary's Manuals
g. legal forms loose-leaf notebook
h. Law Dictionary for Non-Lawyers
i. Canon of Ethics for Legal Secretaries

*AREA OF COMPETENCY: WORD PROCESSING/CORRESPONDENCE SKILLS

I.A. Performs logging-in procedures for work received in recorded form

1. removes media from recorder
2. places clean media on recorder when necessary
3. completes log sheet and attaches media removed from recorder

    a. records time dictation was received

4. places media and log sheet in hold folder according to "work in progress" procedures

I.B. Performs logging-in procedures for hard copy

1. completes log sheet and attaches to hard copy

    a. records time copy was received

2. places hard copy and log sheet in hold folder according to "work in progress" procedure

I.C. Performs logging-in procedures for stored copy

1. selects needed materials from stored copy file
2. completes log sheet indicating amount of work and time of completion

I.D. Files, locates, and retrieves or plays back stored documents (magnetic media and typewritten copy) in procedure with the currently used filing system

I.E. Codes documents for filing by assigning code number and author's name or number according to the system used

I.F. Retains completed magnetic output media for a predetermined number of days

I.G. Keyboards on magnetic keyboard from recorded media, hard copy, or stored documents and produces final copy as requested

1. removes recorded media, hard copy, or stored documents from central hold folder or stored document file following system procedures used to obtain materials needed for keyboarding

    a. indicates time and date picked up on log sheet

2. keyboards materials obtained

    a. types copy

        (1) rough-draft form
        (2) first-time-final
        (3) documents for permanent storage

3. edits and proofreads for playback in final form

    a. punctuation
    b. spelling
    c. grammar
    d. word division
    e. format

4. plays back rough draft, edited materials in final form

5. uses line counter or specific office measuring procedure to determine amount of work typed

6. completes log sheet to indicate work completed

    a. indicates time completed
    b. classifies type of document

        (1) original
        (2) hard copy
        (3) stored document

(4) revisions
(5) statistical

c. determines amount of work completed

(1) lines
(2) pages
(3) keystrokes
(4) time

7. scans, erases, refiles, or returns to user the transcribed media, hard copy, or stored documents as determined by center procedures

8. routes completed copy to word originator

I.H. Keyboards on magnetic keyboard variable information when playing back stored documents

1. obtains stored document according to center procedures
2. plays back stored material and inserts variable information as needed
3. edits and proofreads for accurate final copy
4. measures work
5. completes log sheet
6. completes copy and returns to word originator for final approval

I.I. Proofreads all typed material for accuracy

I.J. Uses specialized reference materials for understanding of operations, procedures, and utilization of a word processing system

1. uses author's manual or book of authorized users of the system
2. uses secretary and dictator procedure manuals

AREA OF COMPETENCY: MACHINE OPERATION (VERY IMPORTANT)

I.A. Operates the standard manual typewriter to perform basic office duties

I.B. Operates the standard electric typewriter to perform basic office duties

I.C. Operates the selectric typewriter to perform basic office duties

I.D. Operates the self-correcting typewriter to perform basic office duties (Optional)

I.E. Operates the proportional spacing typewriter to perform basic office duties (Optional)

I.F. Operates automatic/power typewriter to perform basic office duties (Optional)
Kind: _____

I.G. Operates the 10-key adding machine to perform basic office duties

I.H. Operates the electronic display calculator to perform basic office duties

I.I. Operates the electronic printing calculator to perform basic office duties

I.J. Operates the printing calculator to perform basic office duties (Optional)

I.K. Operates the full-key adding machine to perform basic office duties (Optional)

I.L. Operates the transcribing machine to perform basic office duties

* I.M. Operates the posting machine to perform basic office duties (Optional)

*AREA OF COMPETENCY: SPECIALIZED DUTIES

I.A. Reads articles in professional journals and publications to stay informed about the profession

I.B. Keeps legal forms book current

1. enters proper materials in forms book to keep it current

    a. makes photocopies of materials from completed daily work
    b. punches and inserts photocopy alphabetically
    c. records information in table of contents

I.C. Maintains a law library

1. maintains law library (through a basic knowledge of library)
2. updates references by replacing outdated material with current material

I.D. Serves, records, and files legal papers for future action and reference

1. serves legal papers
2. files and records legal papers at proper government offices

I.E. Performs various office duties involved with citations

1. refers citation to attorney
2. schedules citation in attorney's appointment book

AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION, STUDENT ORGANIZATIONS (OPTIONAL)

I.A. Participates in supervised work experience training (co-op or internship)

I.B. Participates in a simulated office program

I.C. Participates in co-curricular student organizations

COMPETENCY RECORD

The COMPETENCY RECORD that appears in this section is suggested as a replacement for the traditional report card. It can be used to give employers, teachers, counselors, students and parents information about what each student can and cannot do.

The COMPETENCY RECORD should follow the student through his or her vocational training in the secondary and/or the post-secondary school. The recommended grading scale is shown on the COMPETENCY RECORD. The COMPETENCY RECORD on the following pages includes ALL the AREAS OF COMPETENCY recommended for a graduate of the Legal Secretary Occupational Program.

COMPETENCY RECORD

OCCUPATIONAL PROGRAM: **Legal Secretary**

Name of Student_____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the traditional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE:

5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.

4 - Performs task(s) at job entry level; competent.

3 - Performs task(s) with periodic assistance.

2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED: DATES ATTENDED INSTRUCTOR'S NAME(S)

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS							
*IV.A. Types *(or utilizes a word processing system and proofreads to obtain needed legal) and general business correspondence from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription *(telephone dictation, legal reference books and information gathered from other documents in the files)	*						
*IV.B. Types multiple copies of general business forms that are pertinent to the specific business *(or for client's use) from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, *machine transcription, information compiled and composed at the typewriter, *(optional) shorthand note transcription *(telephone dictation, legal reference books, and information gathered from other documents in the files)	*						
*IV.C. Types *(or utilizes a word processing system and proofreads to obtain needed legal) and miscellaneous material from: typed rough draft, handwritten rough draft, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books, and information gathered from other documents in the files)	*						
I.D. -omit-							
I.E. Types or prepares *(and proofreads masters)	*						

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
*I.F. Types or prepares *(and proofreads masters) copy for reproduction	*						
I.G. Proofreads and makes neat and accurate corrections of *all typed material *(including originals and copies--very important)	*						
*I.H. Types or utilizes a word processing system and proofreads to obtain specialized legal business records for clients from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books and information gathered from other documents in the files)	*						
*I.I. Types or utilizes a word processing system and proofreads to obtain specialized legal reports from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books and information gathered from other documents in the files)	*						
*I.J. Types or utilizes a word processing system and proofreads to obtain specialized legal documents and papers from: blank form, typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription, *(telephone dictation, legal reference books and information gathered from other documents in the files)	*						

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.K. Types specialized tax forms for clients for corporations, partnerships, sole proprietorships, and individuals from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription, information compiled and composed at the typewriter, shorthand note transcription,(telephone dictation, legal reference books and information gathered from other documents in the file), composing at the typewriter (optional)	*						
* Rough draft _____pwpm (___pwpm minimum standard) for ___ minutes (___minutes): Machine transcription ___ Comments: pwpm (___pwpm minimum standard) for ___ minutes (___ minutes): Shorthand (Kind:_____) taken at ___wpm (___wpm minimum standard) for ___ minutes with ___% accuracy (___% minimum accuracy): Shorthand (Kind:_____) note transcription at_____pwpm (___pwpm minimum standard)							
AREA OF COMPETENCY: COMMUNICATIONS COMPOSITION							
*I.A. Composes business letters							
I.B. Composes business and informational reports under direct supervision							
I.C. Composes and/or edits other materials under direct supervision							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT (VERY IMPORTANT)							
II.A. Maintains the currently used filing system							
I.B. Revises files to keep them current							
I.C. Cross-references documents and prepares cross reference materials							
I.D. Maintains index files							
I.E. Maintains "tickler" files for follow-up responsibilities							
I.F. Maintains personal "work in progress" file							
I.G. Operates micro-reproducing equipment (Optional)							
I.H. Selects materials for micro-reproduction (Optional)							
I.I. Determines recordkeeping needs and suggests a filing system							
I.J. Establishes and sets up a filing system							
I.K. Maintains files for shorthand notebooks							
*I.L. Maintains files for clients' wills							
*I.M. Conforms all files and copies of legal documents with originals							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: PUBLIC RELATIONS AND STAFF SERVICES/ RECEPTIONIST DUTIES							
II.A. Screens persons who enter the office							
I.B. Manages appointment information							
Comments:							
AREA OF COMPETENCY: OFFICE FUNCTIONS							
I.A. Keeps the reception area in order							
I.B. Operates intercom system							
I.C. Maintains a bulletin board of announcements, news, etc.							
I.D. Maintains employee information directory							
I.E. Writes/prints legibly							
*I.F. Attends station or arranges for replacement							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: OFFICE EQUIPMENT							
II.A. Maintains office equipment							
II.B. Selects and keeps equipment current							
Comments:							
* AREA OF COMPETENCY: OFFICE SUPPLIES AND LEGAL FORMS							
III.A. Maintains and keeps up to date personal and office inventory of supplies							
Comments:							
AREA OF COMPETENCY: MEETING/TRAVEL ARRANGEMENTS (VERY IMPORTANT)							
I.A. Makes travel arrangements							
I.B. Schedules meetings/conferences/*depositions							
Comments:							
AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS							
I.A. Answers incoming telephone calls							
I.B. Places outgoing telephone calls							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.C. Places outgoing and receives incoming calls using specialized telephone equipment							
I.D. Finds needed information by using the telephone directory							
II.E. Maintains internal telephone records and checks them against billing							
I.F. Answers incoming calls using a switchboard							
*I.G. Places specialized calls							
Comments:							
AREA OF COMPETENCY: MAIL							
II.A. Receives and processes incoming mail							
I.B. Prepares outgoing mail							
Comments:							
AREA OF COMPETENCY: REPROGRAPHIC SERVICES							
II.A. Supervises and/or creates needed copies							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Makes decisions about reprographic needs							
*I.C. Proofreads at all stages to insure accuracy (very important)							
*I.D. Inserts additional corrected or edited material for reproduction by cutting or taping							
Comments:							
AREA OF COMPETENCY: NUMERICAL DATA							
I.A. Maintains a petty cash fund							
I.B. Maintains a pegboard accounting system as needed for specific business (e.g. payroll, cash receipts)							
I.C. Prepares payroll							
I.D. Maintains *office checking and *trust accounts							
I.E. Handles payment of bills and statements							
I.F. Maintains accounts receivable records							
I.G. Maintains accounts payable records							
I.H. Maintains journals							
I.I. -omit-							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.J. Operates an accounting machine *(to post to clients' ledger cards. (Optional)							
*I.K. Prepares financial reports							
*I.L. Maintains investment and insurance records							
*I.M. Prepare income tax returns							
*I.N. Maintains designated time records							
Comments:							
AREA OF COMPETENCY: DATA PROCESSING							
I.A. Codes forms for data entry							
I.B. Reads computer printouts to obtain information to prepare required reports							
I.C. Checks source documents against computer printouts for accuracy							
I.D. Operates CRT Display screen to check for accuracy or verification of information (Optional)							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
*AREA OF COMPETENCY: SPECIAL RECORDS							
I.A. Maintains and stores specific documents to keep them current (e.g. attorney's diary, court calendars, trust accounts)							
Comments:							
AREA OF COMPETENCY: REFERENCE MATERIALS							
III.A. Uses general reference materials to look up spelling, pronunciation, definition of terms, compose, edit, aid in research, and *word division							
I.B. Maintains a reference library							
*I.C. Uses reference materials specifically for the legal secretary to compose, edit, aid in research, look up spelling, definitions of terms, etc.							
Comments:							
*AREA OF COMPETENCY: WORD PROCESSING/CORRESPONDENCE SKILLS							
I.A. Performs logging-in procedures for work received in recorded forms							
I.B. Performs logging-in procedures for hard copy							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.C. Performs logging-in procedures for stored copy							
I.D. Files, locates, and retrieves or plays back stored documents (magnetic media and typewritten copy) in procedure with the currently used filing system							
I.E. Codes documents for filing by assigning code numbers and author's name or number according to the system used							
I.F. Retains completed magnetic output media for a predetermined number of days							
I.G. Keyboards on magnetic keyboard from recorded media, hard copy, or stored documents and produces final copy as requested							
I.H. Keyboards on magnetic keyboard variable information when playing back stored documents							
I.I. Proofreads all typed material for accuracy							
I.J. Uses specialized reference materials for understanding of operations, procedures, and utilization of a word processing system							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: MACHINE OPERATION (VERY IMPORTANT)							
I.A. Operates the standard manual typewriter to perform basic office duties							
I.B. Operates the standard electric typewriter to perform basic office duties							
I.C. Operates the selectric typewriter to perform basic office duties							
I.D. Operates the self-correcting typewriter to perform basic office duties (Optional)							
I.E. Operates the proportional spacing typewriter to perform basic office duties (Optional)							
I.F. Operates automatic/power typewriter to perform basic office duties (Optional) Kind:							
I.G. Operates the 10-key adding machine to perform basic office duties							
I.H. Operates the electronic display calculator to perform basic office duties							
I.I. Operates the electronic printing calculator to perform basic office duties							
I.J. Operates the printing calculator to perform basic office duties							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.K. Operates the full-key adding machine to perform basic office duties (Optional)							
I.L. Operates the transcribing machine to perform basic office duties							
I.M. Operates the posting machine to perform basic office duties (Optional)							
Comments:							
* AREA OF COMPETENCY: SPECIALIZED DUTIES							
I.A. Reads articles in professional journals and publications to stay informed about the profession							
I.B. Keeps legal forms book current							
I.C. Maintains a law library							
I.D. Serves, records, and files legal papers for future action and reference							
I.E. Performs various office duties involved with citations							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION, STUDENT ORGANIZATIONS (OPTIONAL)							
I.A. Participates in supervised work experience training (co-op or internship) Type of business, institution, or agency: _____ Length of time: _____							
I.B. Participates in a simulated office program Length of program: _____							
I.C. Participates in co-curricular student organizations Name of organization: _____							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

INDUSTRY REPRESENTATIVES

The following Industrial Representatives were involved in the development of the task list for this occupational program.

Ms. Sheilah Dedrickson
Office Manger
Crawford and Anderson Law Firm
33 East Wentworth Avenue
West St. Paul, MN 55118

Mr. Larry Houk
1616 Pioneer Building
St. Paul, MN 55101

Mr. Thomas Borden, Attorney
Borden, Steinbauer, Borden
& Rathke
Sixth and Laurel
Brainerd, MN 56401

RoseAnn David, Secretary
Borden, Steinbauer, Borden
& Rathke
Sixth and Laurel
Brainerd, MN 56401

Mr. Max Ruttger III
Attorney at Law
Ryan, Ryan, Ebert and Ruttger
217 South 4th Street
Brainerd, MN 56401

Mr. John R. Speakman
Probate Specialist
118 East Main
Anoka, MN 55303

DEVELOPERS

Curriculum Articulation Project

Dr. Laura J. Burger, Director
Ms. Deena B. Allen, Curriculum Specialist
Statewide Curriculum Articulation Project
3554 White Bear Avenue
White Bear Lake, MN 55110

Ms. Connie Kohls, Curriculum Specialist
Statewide Curriculum Articulation Project
Brainerd A.V.T.I.
300 Quince Street
Brainerd, MN 56401

Ms. Tana Sorenson
Willmar A.V.T.I.
Box 1097
Willmar, MN 56201

Ms. Sandra Stamson
Granite Falls A.V.T.I.
Granite Falls, MN 56241

Ms. Diane Halzenbeklen
916 A.V.T.I.
3300 Century Avenue
White Bear Lake, MN 55110

Mrs. Phyllis Martinson
Brainerd A.V.T.I.
300 Quince Street
Brainerd, MN 56401

Ms. Adrienne Sulerud
Duluth A.V.T.I.
2101 Trinity Road
Duluth, MN 55802

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

Secretarial/clerical personnel work with people. For this reason additional competencies in the area of Human Relations and Personal Development are needed by the student who wishes to become employed. People work together when they have an understanding of themselves and their co-workers and when they willingly make appropriate adjustments in their own behavior.

The STATEMENTS OF COMPETENCY shown in the following section of this task list represent the minimal Human Relationship and Personal Development skills needed by graduates of secretarial/ clerical programs. It should be recognized that students will continue to learn about themselves and others through daily experiences they have in their careers.

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

AREA OF COMPETENCY: COMMUNICATIONS

A. Demonstrates acceptance of people in a friendly business-like manner

1. interacts verbally with people in communicating a message

   a. enunciates clearly
   b. uses correct grammar and appropriate choice of words
   c. shows/demonstrates tact
   d. responds courteously
   e. uses a pleasant speaking tone, rate and volume

2. asks, remembers and uses persons' names in communicating with people

3. interacts non-verbally with people in communicating a message

   a. recognizes the meaning of facial expression
   b. recognizes the meaning of body language
   c. recognizes the meaning of eye contact
   d. recognizes the meaning of hidden messages

B. Listens to and responds to the messages received from co-workers, supervisors and visitors

1. takes notes when receiving instructions
2. periodically looks at the person who is speaking to obtain visual cues
3. asks for clarification when the message is not understood
4. concentrates on one thing at a time as directions are given

C. Gives directions and responds to other people

1. makes use of an understanding of human behavior
2. displays an ability to be assertive without being offensive
3. deals effectively with angry or defensive co-workers/customers
4. recognizes the uniqueness of and differences in individuals

AREA OF COMPETENCY: SELF-DEVELOPMENT

A. Demonstrates a disposition for continued personal growth and understanding of self

1. thinks positively about himself/herself and his/her future
2. does not show off to bolster his/her self-confidence
3. waits for what he/she wants
4. makes up his/her mind decisively
5. admits his/her shortcomings
6. recognizes and builds on his/her strengths without becoming vain
7. seeks out new ways to develop his/her talents
8. has a realistice self-image based upon the way that others see him/her
9. has a positive attitude about self and others

B. Displays personal development for social living

1. handles personal finances
2. chooses life style and housing options
   a. displays an ability to live and work with others harmoniously
3. chooses safe and reliable transportation
4. identifies personal biases, prejudices, and stereotypes

C. Shows emotional maturity

1. tolerates frustrations
2. thinks for himself/herself
3. is calm and exerts extra effort to keep on an even level
4. tackles unpleasant tasks without self-pity
5. takes responsibility for his/her own actions
6. understands his/her role in group dynamics
7. takes orders without becoming obstinate
8. is motivated by a long-range plan, not by whims or desires of each passing week
9. does not nurse grudges or try to get even

D. Maintains professional maturity

1. has clearly defined career goals

   a. views his/her job professionally, rather than as only a means of obtaining a pay check
   b. sees job satisfaction as part of good mental health
   c. sets realistic goals based on his/her abilities

AREA OF COMPETENCY: PERSONAL APPEARANCE

A. Maintains good physical fitness behavior patterns

1. gets sufficient sleep
2. shows good nutrition

3. gets proper exercise
4. has annual dental and medical check-ups
5. has good posture

B. Shows good visual poise

1. demonstrates an appropriate method of standing, walking, sitting, bending and lifting

C. Selects and wears proper office attire

1. is groomed attractively and tastefully
   a. wears clean, wrinkle free garments
   b. wears flattering colors and garment styles for his/her figure
   c. chooses accessories that are appropriate for work
      (1) fads
      (2) fashions
   d. coordinates colors of garments and accessories worn together
   e. plans a wardrobe for a limited budget
   f. wears shoes that are quiet, polished, fastened and in good repair
   g. shops for clothing that is well constructed so that it will last

D. Has good personal hygiene habits

1. bathes his/her body regularly
2. uses antiperspirant
3. has clean hair, skin, teeth, nails, and breath
4. wears clean clothes that have been laundered properly
5. removes hair properly and regularly from selected areas of the body
6. applies cosmetics in a skillful way to enhance features
7. subtly applies body fragrances

AREA OF COMPETENCY: OFFICE ATTITUDE

A. Relates to male and female co-workers of all ages, skills, backgrounds, and positions

1. contributes to a team effort
   a. requests and/or gives assistance to other people
   b. handles constructive/non-constructive criticism and profits from it
   c. declines invitations gracefully
   d. responds cheerfully and gives praise when appropriate
   e. is supportive and encouraging to co-workers

2. assumes individual job responsibility
3. deals effectively with friction and tension within the office

    a. co-workers who don't assume full share of workload
    b. moodiness of co-workers/supervisors
    c. favoritism among staff
    d. personal problems which interfere with work
    e. offensive language or behavior of co-workers, supervisor or customers
    f. improper hygiene of co-workers which is offensive to others
    g. angry customers
    h. chronic complainers
    i. short-tempered co-workers, supervisor or self

B. Supports company and employer by exhibiting professionalism

1. shows loyalty to company
2. follows the company's policies
3. maintains confidentiality of company/institutional information
4. anticipates needs of supervisor
5. demonstrates cost control

    a. conserve supplies
    b. use time efficiently
    c. develop and improve personal work methods and procedures

6. displays good housekeeping habits

    a. cleans and maintains work area
    b. cleans and organizes employer's work area as instructed
    c. makes coffee and keeps coffee area neat and clean

7. shows professional commitment to his/her employer

    a. shows flexibility and willingness to try new approaches
    b. is versatile and willing to adopt his/her behavior to new situations
    c. willingly works overtime to meet scheduled deadlines
    d. asserts his/her feeling, needs, and competence in communicating with his/her employer about salary, benefits, and company policy

C. Shows that he/she is dependable in the office situation

1. has work habits that insure work being accomplished on time and correctly
2. arrives at work on time and maintains scheduled working hours
3. plans and schedules work assignments and priorities
4. takes reasonable coffee breaks and lunch breaks
5. has a good attendance record with sick leave and personal days taken when necessary
6. pays attention to detail so that high quality work is maintained consistently
7. follows through to completion work that has been started

D. Shows initiative in gaining professional advancements

1. seeks job/self enhancement experiences

a. updates his/her skills and knowledge through formal education, in-house training, and informal communication
b. participates in professional organizations

2. selects or rejects job promotions based on opportunity, personal goals, and circumstances

a. examines alternatives and engages in career planning

(1) long term
(2) short term

AREA OF COMPETENCY: SOCIAL AND BUSINESS ETIQUETTE

A. Displays proper social etiquette

1. etiquette for social functions (e.g. introductions, table manners, common courtesy)

B. Displays proper business etiquette

1. converses with co-workers and guests in a socially acceptable manner, within the time constraint of the office situation

a. office business (non-confidential)
b. personal business
c. social events
d. topics of general interest

2. uses the informal communications network (grapevine) within the office in a positive way

3. refrains from contibuting to office gossip

4. addresses superior properly (e.g. Mr., Dr., Ms., etc.)

   a. formal
   b. non-formal

AREA OF COMPETENCY: JOB SEEKING SKILLS

A. Identifies job opportunities for which he/she is qualified

   1. checks school bulletin board
   2. reads newspaper ads
   3. contacts employment agencies

      a. state
      b. private

   4. uses personal contacts

B. Prepares for job interview

   1. writes and types a resume
   2. composes and types a letter of application
   3. contacts a prospective employer
   4. arrives on time
   5. conveys an optimistic outlook and willingness to learn

C. Participates in a job interview

   1. dresses and grooms himself/herself appropriately
   2. obtains job information from perspective employer

      a. job requirements
      b. benefits
      c. environment
      d. salary
      e. opportunity for advancement
      f. company's purpose and function

D. Follows-up on the job interview

   1. sends an acknowledgment letter
   2. makes a phone call

COMPETENCY RECORD

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

OCCUPATIONAL PROGRAM: LEGAL SECRETARY

Name of Student _____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the traditional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE.

5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.

4 - Performs task(s) at job entry level; competent.

3 - Performs task(s) with periodic assistance.

2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED: DATES ATTENDED INSTRUCTOR'S NAME(S)

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: COMMUNICATIONS							
A. Demonstrates acceptance of people in a friendly-business-like manner							
B. Listens to and responds to the messages received from co-workers, supervisors and visitors							
C. Gives directions and responds to other people							
Comments:							
AREA OF COMPETENCY: SELF-DEVELOPMENT							
A. Demonstrates a disposition for continued personal growth and understanding of self							
B. Displays personal development for social living							
C. Shows emotional maturity							
D. Maintains professional maturity							
Comments:							
AREA OF COMPETENCY: PERSONAL APPEARANCE							
A. Maintains good physical fitness behavior patterns							
B. Shows good visual poise							
C. Selects and wears proper office attire							
D. Has good personal hygiene habits							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
Comments:							
AREA OF COMPETENCY: OFFICE ATTITUDE							
A. Relates to male and female co-workers of all ages, skills, backgrounds, and positions							
B. Supports company and employer by exhibiting professionalism							
C. Shows that he/she is dependable in the office situation							
D. Shows initiative in gaining professional advancements							
Comments:							
AREA OF COMPETENCY: SOCIAL AND BUSINESS ETIQUETTE							
A. Displays proper social etiquette							
B. Displays proper business etiquette							
Comments:							
AREA OF COMPETENCY: JOB SEEKING SKILLS							
A. Identifies job opportunities for which he/she is qualified							
B. Prepares for job interview							
C. Participates in a job interview							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
D. Follows up on the job interview							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

CE 009 582

Developers: Human Relations and Personal Development

Ms. Linda Anderson
Hutchinson A.V.T.I.
Hutchinson, MN 55350

Ms. Linda Jeffries
Moorhead A.V.T.I.
810 Fourth Avenue South
Moorhead, MN 56560

Ms. Ann Ellinson
Moorhead A.V.T.I.
810 Fourth Avenue South
Moorhead, MN 56560

Mr. Milo Loken
Hennepin Technical Center North
9000 North 77th Avenue
Brooklyn Center, MN 55445

Ms. Mary Ruprecht
Word Processing Management
Consultant
140 West Myrtle Street
Duluth, MN 55881

Ms. Willa Campbell
St. Cloud A.V.T.I.
St. Cloud, MN 56301

Miss Shirley Buckholz
Minnetonka High School
1830 Highway 7
Minnetonka, MN 55343

Ms. Cheryl Boche
South Washington Co. Schools
Park High
Cottage Grove, MN 55075

Ms. Katheryn Simonson
Brainerd A.V.T.I.
300 Quince Street
Brainerd, MN 56401

Ms. Marlene Paulcowitz
916 A.V.T.I.
3300 Century Avenue
White Bear Lake, MN 55110

Mr. Frank Starke
Alexandria A.V.T.I.
Alexandria, MN 56308

Mr. Dennis Lynden
Alexandria A.V.T.I.
Alexandria, MN 56308

Mr. Dave Teske
Hutchinson A.V.T.I.
Hutchinson, MN 55350